

Performance Management Program Overview & Process

For Managers & Supervisors

March 30, 2023

Presented by Corporation Human Resources

Agenda

- **Introductions**
- **Survey Recap**

- **Part 1: Performance Management Program Overview**
 - Framework
 - Notes Capability
 - Goal Setting
 - New Competencies

- **Part 2: Performance Management: Process**
 - Trakstar
 - Timeline

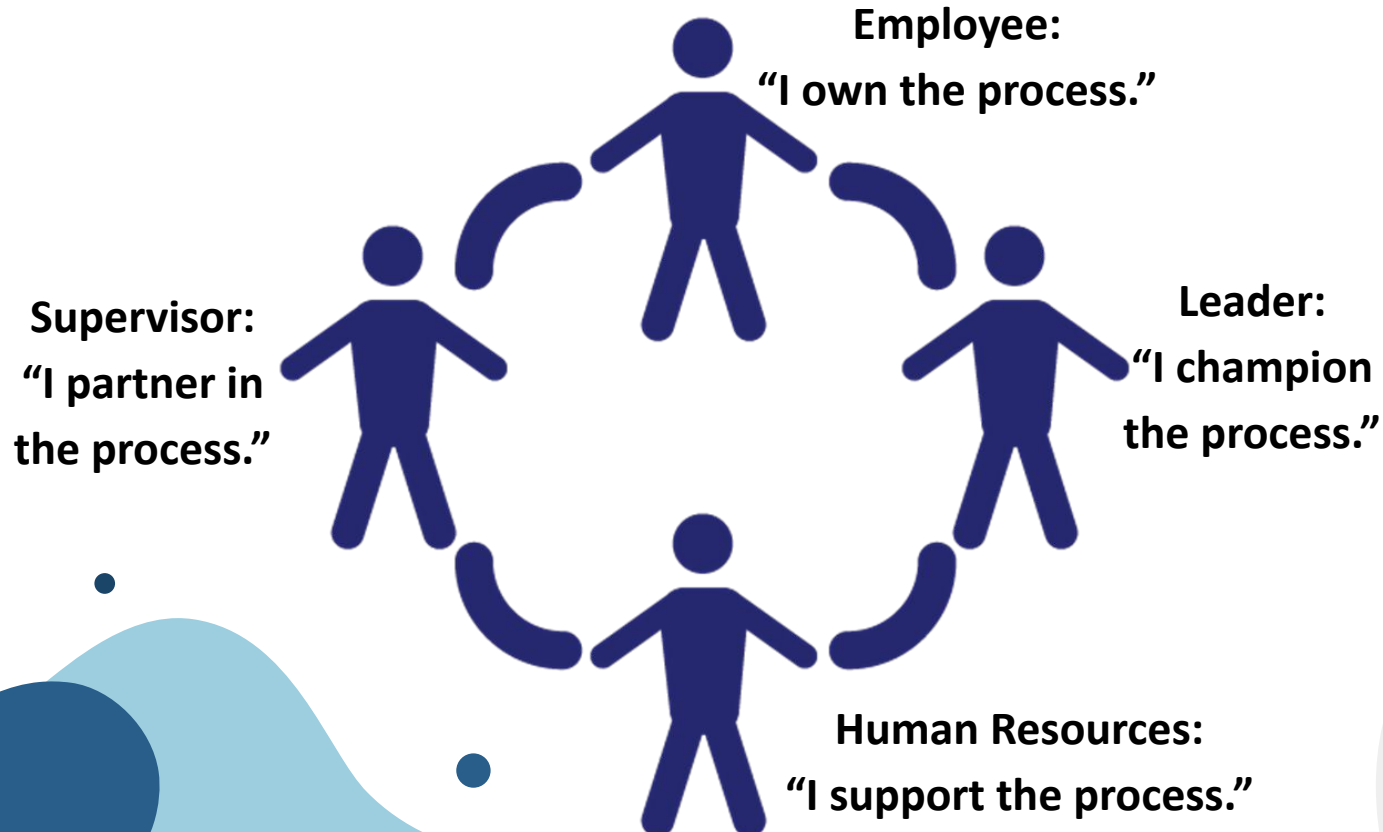
- **Resources**
 - Website
 - Sum Total

- **Q&A**

Survey Recap

- Fewer competencies
- Additional videos and training
- More reminders
- Notes are helpful

Effective Performance Management Involves Everyone



Performance Management Framework

- Performance Management is an ongoing process involving feedback, coaching and recognition.
- Effectively manage performance by acting with purpose to enhance competence, confidence and capability.
- Key phases throughout the year help maintain a focus on building talent and driving results through employee contributions.



Note Taking

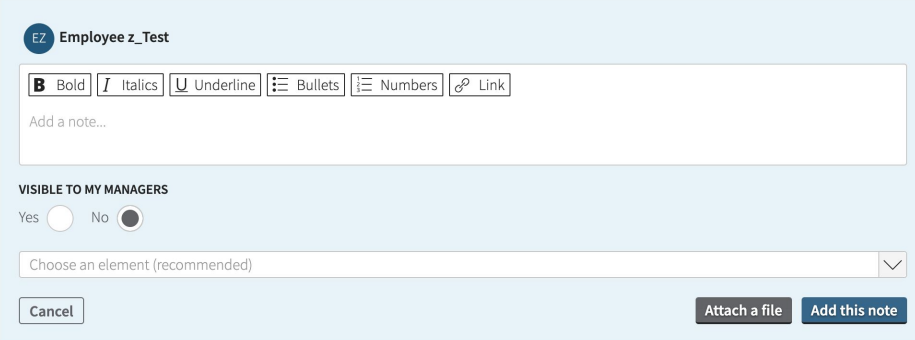
Trakstar allows supervisors, managers, and employees to continuously add notes and feedback throughout the year.

Ongoing note-taking benefits:

- *Reduces recency bias*
- *Reduces completion time*

Add a note when an employee:

- *Achieves a milestone*
- *Exhibits exceptional teamwork*
- *Received positive feedback from a client*
- *Demonstrates initiative*



The screenshot shows a user interface for adding a note. At the top, it says "Ez Employee z_Test". Below that is a rich text editor toolbar with buttons for Bold, Italic, Underline, Bullets, Numbers, and Link. The main text area contains the placeholder "Add a note...". Below the text area, there is a section titled "VISIBLE TO MY MANAGERS" with radio buttons for "Yes" and "No", where "No" is selected. Below that is a dropdown menu labeled "Choose an element (recommended)". At the bottom, there are three buttons: "Cancel", "Attach a file", and "Add this note".

Note-Taking Resources:

- Employees: [Video- how to add notes](#)
- Supervisors: [Video- how to add notes](#)

Goal Setting

- Clarify and align goals for the year - do this by Review job responsibilities and create measurable components
- Set clear and measurable goals; define expectations
- Discuss University wide competencies; identify development opportunities and interests in both the short (current role) and longer term (career goals)
- Use SMART goal criteria:
 - Specific
 - Measurable
 - Achievable
 - Relevant
 - Time-bound

BENEFITS OF Goal Setting



1

ACTS AS A
COMPASS FOR
YOUR BUSINESS

2

INCREASES
MOTIVATION



3

REDUCES STRESS
IN THE
WORKPLACE



4

IMPROVES
EMPLOYEE
ENGAGEMENT



• Goal Setting Responsibilities

Your Role As A Supervisor

1. Clearly communicate expectations re: job responsibilities and competencies (skills) and behaviors
2. Communicate how individual goals align with department and organization goals
3. Help your employees set clear, measurable performance goals
4. Offer advice and guidance regarding your employee's performance on a consistent, on-going basis

Employee Role

1. Understand how their role aligns with division and department goals, and participate actively in setting expectations
2. Work with you to set clear, measurable performance goals
3. Monitor their own performance compared to expectations
4. Seek advice and guidance as needed from you

Online Performance Management

Trakstar Perform



Competencies



Communication



**Professional
Development &
Learning**



**Serving
Students**



**Diversity &
Inclusion**



**Work Quality &
Quantity**



**Management
Leadership**



**Problem
Solving**

Competency Ratings

Five-Point Scale

Unacceptable/ Unsatisfactory	Below Expectations/ Needs Improvement	Meets Expectations/ Satisfactory	Exceeds Expectations/ Commendable	Outstanding
---------------------------------	--	--	---	-------------

***** Comments are required *****

***** Comments must align with scoring *****

360 Feedback

Direct Report Has Two Managers

Trakstar Perform only allows one manager to be assigned to an employee in the system. In many instances, an employee might have two managers. In this case, the assigned manager can request 360 feedback from the second manager to get their feedback on the employee.

Feedback from Employees

The employee has worked with another employee and their feedback would be valuable to the review process.

Feedback from People Outside the Organization

The employee has worked with someone outside of the organization (a vendor, consultant, etc) and their feedback would be valuable to the review process.

Project Feedback

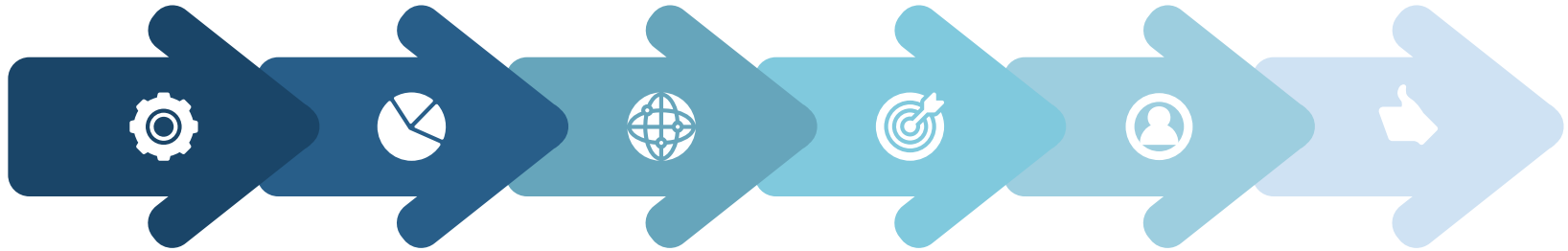
The employee has completed a project that they are working on. They can solicit feedback from their peers or other people within the organization that they worked on the project with.

Appraisal Workflow

**Employee
Self-Evaluation**

Approvals
Evaluator > HR >
Evaluator's Manager

Finalize/Submit
by August 31



**Review Notes &
360 Feedback**

**Manager
Evaluation**

**Review with
Employee**

Evaluation Tasks

Scoring Window *April - August*

- Review Period is July 1-June 30
- Review Notes
- 360 Feedback
- Employee Self-Eval
- Competency Scoring
- Approvals
- Review with Employee
- Finalize by August 31

Goals and Notes *Year-Round*

- Continuous feedback
- Manager & Employee
- Add Notes
- Update Goals
- Measure Progress

Timeline

Timelines	Current	Description
Performance Cycle	July 1 – June 30	Responsible parties should begin tracking performance by setting up defined goals; this should be done during the previous year annual evaluation meeting
Evaluations Due	August 31	Following the evaluation meeting, employees will be prompted to review and approve their evaluation in the system.



COMPANY NAME

USERNAME

PASSWORD








Stay logged in for 3 months

Log in

[Help! I can't log in](#)

Goals.
Feedback.
Reviews.

[Learn More](#)

-  Home
-  My Notes
-  Reviews ▼
-  Track Goals ▼
-  Org Chart
-  Reports ▼
-  Engagement

Home

Welcome to Trakstar!

Trakstar is a performance management system that allows the ability to gather job performance information through **360 Feedback**, **Goal Tracking**, **Performance Reviews**, and **Notes** you can take in real time throughout the year.

Click here to enroll in [Employee Training](#)

Click here to enroll in [Manager Training](#)

Visit the Trakstar support page to help you get started: <https://trakstar.helpscoutdocs.com/>

My Reviews

 [My Archived Reviews](#)



Current Review

DUE 7/31/2022 **PERIOD** Annual Review

[Score Review](#)



Future Review

[Set Future Goals](#)



Home



My Notes



Reviews



Track Goals



Org Chart



Reports



Engagement

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My Reviews

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Current Review

DUE 7/31/2022

PERIOD Annual Review

[Score Review](#)



Future Review

[Set Future Goals](#)

Direct Reports (1)

Sort by Due Date



Find Direct Reports

Review

Deadline

Position

Action



z_Employee, UCorp



Annual
Review Set

Complete by 7/31/2022

1 - Form Template

[Score Review](#)



Employee

UCorp z_Employee ▾

Manager Andrea Bozant

Review

Annual Review

Position 1 - Form Template

Process Annual

Manager Review

4

[View All Scores](#)



Goals and Notes 5 Goals	360-Rater Feedback ✔ Complete	Self-Review 🔄 Due 7/31/2022	Manager Review ✔ Complete	Approval ? Unsent	Archive ? Due 7/31/2022	Future Set Future Goals
----------------------------	----------------------------------	--------------------------------	-------------------------------------	----------------------	----------------------------	----------------------------

✔ Scoring Complete

Competencies	4
Communication	3
Continuous Learning	3
Customer Service	3
Diversity & Inclusion	3
Employee Effectiveness	3
Interpersonal Skills	5
Job Knowledge	5
Managing Vision	5
Overall Score	4

Annual Review for UCorp z_Employee

Position Description
Position example description

0 Unscored Elements 0 Unanswered Questions

Competencies 4

Communication 3

Continuous Learning 3

Customer Service 3

Diversity & Inclusion 3

Employee Effectiveness 3

Interpersonal Skills 5

Job Knowledge 5

Managing Vision 5

Work Quality 5

Work Quantity & Productivity 5

Goals 5

goal 1 5

goal 2 5

goal 3 5

goal 4 5

goal 5 5

Questions -

Are there elements that would be hel... -

What long-range goals would you set f... -

What have been your key achievemen... -

What areas for development have you... -

Overall Score 4

Annual Review for UCorp z_Employee

Position Description

Position example description

0 Unscored
Elements

0 Unanswered
Questions

Competencies

Communication


Communication refers to the ability to inform orally and in writing, with clarity and good effect. It means to understand clearly and quickly when instructions or orders are received. It means judgment about what information is important and what is not, and what should be

More 

Unacceptable/Un...	Below Expectatio...	Meets Expectation...	Exceeds Expectati...	Outstanding
--------------------	---------------------	----------------------	----------------------	-------------

Meets Expectations/Satisfactory:

Shows an understanding of the need to initiate or respond to information in an appropriate, timely and complete manner. Oral and written communications are usually acceptable, being both comprehensible and appropriate.

 **Measurements (1)**

⏪ Comments (0)

AB **Andrea Bozant**

B Bold *I* Italics U Underline

-

 Bullets

- 1

 Numbers [Link](#)

When providing information to others, consider the level of detail they need, the timing, and the best method of communicating. Avoid information overload.



⏪ Coaching Tips

+ When providing information to others, consider the level of detail they need, the timing, and the best method of communicating. Avoid information overload.

+ Keep your manager informed of the status of your work on a regular basis. Find out the preferred format for status reports, such as memo, e-mail, drop-in or scheduled meetings.

+ Be sure you clearly understand a customer's needs before proposing a

Cancel

Attach a file

Add this comment

Notes for Andrea Bozant

Profile

Employee Folder

Notes (0)



Annual Review

Choose Review

MANAGER Maddison Burton

ARCHIVE DATE 7/31/2022

POSITION HR Coordinator

PERIOD Annual Review

PROCESS Annual

STATUS Scoring



Andrea Bozant

B Bold *I* Italics U Underline Bullets Numbers Link



VISIBLE TO MY MANAGERS

Yes No

Choose an element (recommended)

Cancel

Attach a file

Add this note

Recap: Trakstar Next Steps

1. Reminder Email

Access to new review available starting April 1st

2. Review Direct Reports

Check for accuracy, notify HR of any changes

3. Score Employees

Send/review 360 feedback
Review self-evaluation
Score competencies and goals

4. Submit Evaluation

Submit evaluation for HR & manager approval
Meet with employees
Finalize in Trakstar by August 31st

Evaluation Tips

- Make objective statements – “Jorge arrived late on four occasions” rather than “Jorge is always late.”
- Consider the totality of the employee’s performance over the entire review period.
- Make and keep adequate records with specific examples.
- Use “I” messages such as:
 - “I observed that you have been late this week on Monday, Wednesday, and today.”
- Positive feedback is more than just “good job!”- Identify how behavior positively impacted you or the team/organization
- Feedback should not be based on personal feelings
- Reflect on your assumptions beliefs about the person/situation
- Give regular feedback to employees – no surprise - major performance concerns should have been addressed prior to delivery of the annual evaluation.
- Avoid copying and pasting the last years’ feedback
- Safety” must be established and maintained in order to have honest and effective performance management conversations

Resources

- **Manager/Supervisor Website**

- If you are a new or existing supervisor, we believe you will find this site to be a beneficial tool to improve online access to onboarding new employees, key personnel policies, performance management, training, and development.
- <https://csumb.edu/corporation/supervisor-information/>

- **Sum Total**

- Includes thousands of training sessions, an even higher number of pages filled with content, and learning activities.
- <https://csumb.edu/up/online-training-sumtotal/>



HR IS HERE FOR YOU!

Being a manager is a challenging role, but it is critical to make time for providing recognition and discussing concerns. HR is here as a partner to advise and assist you, so please reach out to us!

- Meeting to discuss issues and plan of action
- Coaching on how to deliver the appropriate message
- Providing exempt/non-exempt testing for positions
- Preparing compensation analysis

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Questions?

The background features abstract, organic shapes in shades of blue and grey. There are several small, solid-colored dots scattered across the white space. The overall aesthetic is clean and modern.

Thank you!